# REPS Part 1 Classroom (key skills)

## Tutors’ notes

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| Version history | * 1.0 – First draft of new training materials March 2019
* 1.1, 1.2, 1.3, 1.4, 1.5 – Adaptations following on from feedback.
 |

## Introduction

This is the new face to face reps training course for 2023.

Following on from feedback, please find these comprehensive tutors notes as a guide when delivering this course. As with all of the training, there is a good mix of tutor led sessions and practical sessions for reps to build their confidence and understand more about what the role entails. During the various sessions, new reps are invited to add notes and comments onto an ongoing action plan throughout the day, this will enable new reps to return into the workplace, expand their current knowledge and understanding and help them to get active straight away.

We would then suggest Organisers/Negotiators follow up and encourage this activity as much as possible before attending the Reps part 2.

## How these notes work

There are 4 core resources associated with the course:

1. The PowerPoint presentation, which includes visual aids, but also maintains the structure/order of the course
2. The participants workbook, which covers logistics, background information and activity sheets
3. The tutor’s notes which explain the activities, suggest discussion-prompts, give (loose) timings, and ‘index’ the other resources, tying the whole thing together.
4. As tutors who’ve committed to delivering this course, we would suggest a small amount of preparation time ahead of the course to ensure you’re familiar with the session, activities and tutor instruction.

## Tutor Notes/Course Structure

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| **Session** | **Slide no/WB page** | **Notes** | Resources |
| **Welcome**(Before 10am) |  Slide 1/ pg1-9 | * Slide one showing.
* Invite people, as they arrive, to skim through introductory section of workbook (History of Prospect/ Trade Union Terminology))
* Write on name cards.
* Coffee and tea, water if provided.
* The course timetable is left untimed deliberately so as not to restrict the sessions, we have added in suggested tea breaks and lunch break, as a guide to the tutor.
 | **Tutor to ensure you have; Screen, projector, flipchart and pens****Workbook, tutor notes, name cards****T&S policy, expense forms, Evaluation forms, E&D forms** |
| **Session 1 –** Introductions and objectives (10.00) | Slide 1/ refer to pg 2/9 | * Introduce tutors here.
* Pronoun to be mentioned and refer to name cards if necessary (as on page 9)
* Go over housekeeping: toilet locations, fire alarms (NPH Friday morning), timetable for the day & breaks (roughly 11.30, 13.00, 15.00) and mention punctuality.
* Go through Learning outcomes on page 2.
* Interactive course and reps are encouraged to discuss, raise items and participate in the sessions.
 | Name cardsTea, coffee etcTutor to find out when the fire alarm is in other venues other than NPH. |
| (10.05)(10.15 – 11.00) | Slide 2/p10-11 | * **Session 1. Activity A.**
* **Split group into pairs (if odd number one group of three and if a delegate arrives later ask them to introduce themselves)**
* **Added in how long they’ve been a rep as this should guide the tutor in terms of reference throughout the day.**
* **Interviews should be quick (max 5 minutes then swap), giving most of the time (30 - 45 min dependant on size) for introductions to the group.**
* **In turn ask delegates to introduce their partner**
* **Write down answers to what they want to get from the course. This can be referred to during the day but also covered by next steps, further courses perhaps. The most important point is that these are the outcomes of the delegates and to recap over them at the end of the day to ensure they’ve been met wherever possible.**
* **Finish session by summing up traditional image portrayed by media of trade union reps. Reality is a highly skilled, diverse group backed by interesting facts.**
* **Emphasise all delegates have one thing in common, you want to help your work colleagues and that is an excellent thing.**
 | Workbooks pensFlipchart & Pen |
| **Session 2 – What is a trade union?**(11.00) | Slide 3/p12 | * Session 2 what is a trade union?
* Outcome of session 2; the session is designed to find out what the delegates think a trade union is and how it can help them to help with recruitment.
* Ask the question and then go onto the next slide
 | 4 activities for delegates included in this Session |
| (5 mins) | Slide 4/p12 | * The dictionary definition
* Explore perception of what a trade union is and why it is still relevant today
* Explore what delegates think what is meant by interests (rights not yet recognised) in terms of what else delegates can work towards as reps.
* The answers we are looking for are,
* a safe place to work; environmental issues; equality issues; robust procedures that help members (bullying and harassment), highlighting any specific local wins for the branch – either through T&C’s or any positive impact on the workers
 |  |
|  | Slide 5/p12 | * Key item for the strength of a trade union is recognition.
* Younger potential members may feel the union isn’t relevant and out of date…..explain why unions are still very much needed and as current as their members.
* Even if employer resists, union can achieve recognition if has a) over 50% membership, or b) over 10% membership and a majority in ballot against all employees.
* Mention delegates may have recognition already and should have received time off for training as part of the recognition of their new role and the union within the workplace.

Nevertheless, it is useful to know how recognition is achieved and worth remembering workplaces can get de-recognised as well as recognised, so important to keep membership as high as possible | Appendix 4 on the recognition process |
|  | Slide 6/p12 | Additional slide to show the difference between recognition and no recognition.  |  |
| (5 mins) | Slide 7/p12 | * Your right to join a trade union – go over points on pp (no one should be penalised by being part of a trade union and career should not be affected.)
* The law gives everyone the right to join a union.
 |  |
|  | Slide 8/p12 | * The benefits of union membership (most recent figures) **Tutor - may wish to update if changed.**
* Slide has two clicks.
* Firstly, trade union figures
* Secondly, Prospect figures
* Prospect negotiates with more than 400 different employers.
* Lists of historical union victories & link to successes for Prospect (p12/13)
* Facts to back up value of membership and value for money.
* The more local an issue the more difference it’ll make to members directly (keep the issues relevant)
* Most recent published figures and sources are listed for delegates information.
 | Updated figures |
| (11.10) | Slide 9/p18 | * **Session 2, activity B (5 minutes)**
* **Compare a trade union to other options – (learning outcome – no real alternative to a trade union)**
* **Keep as a one large group, tutors act as moderator for discussion.**
* **Social media an example Facebook (not private) and many social media policies in work now – could face disciplinary. Based on opinion and not facts**
* **Worker forum - could be a tactic from employer to get to know issues. Limited action from employees if employer doesn’t do anything.**
* **Individual – no collective voice and for individual with an issue you get support from union (including possible legal and financial)**
* **Professional bodies – may set professional standards but not terms and conditions with an employer.**
* **To sum up this section trade union is there to protect rights and interests include H&S and work life balance.**
* **Will help raise points when recruiting and in the recruitment activity later in the day**
 | Comparisons; Facebook, single employee, employer forum |
| (11.20) | Slide 10/p13 | * **Session 2, Activity C What can a union negotiate on? 15 mins (10 mins in groups 5 mins feedback)**
* **In three groups focus on one area, information, consultation, negotiation.**
* **Following on from our previous discussion on the rights, the benefits of trade union membership and based on comparisons to other options, in your same groups make a list on all the things a union can expect from an employer.**
* **Explain that negotiating is finding a compromise that both sides agree with. (For reference; Campaigning is persuading others that something needs to be done.)**
* **One person from the group will feedback and tutor to flipchart.**
* **As part of their personal action plan talk to a branch officer about what these three areas mean to the branch.**

**Suggested answers (use local examples where possible)*** **Negotiation on; Pay, conditions, health and safety, Equality, Time off, Negotiation/campaigning power depends on membership density and how active members are (leads into activity D)**
* **Information: management changes, company policies, minor changes that affect staff H&S accidents, reports**
* **Consultation: on proposed changes to terms and conditions, redundancies**
 | FlipchartRefer to the action plan on page 39 in workbooks and ask reps to find out what these 3 things mean for their branch. |
| (11.30) | Slide 11/p 14 | * **Session 2 Activity D - Servicing or Organising (introduce the main difference between without giving any opinion) 10 mins.**
* **For brief overview –Servicing focusses on the service element of of a union and tends not to rely on members involvement and election of reps is usually done by union leadership and organising which involves members at all levels and reps are elected by co-workers.**
* **Ask delegates to put a tick next to the statement they feel best describes their workplace or ideas of the union from colleagues/themselves.**
* **Ask delegates which column had the most ticks and what they feel based on their results may be the best approach. (we would hope they say organising)**
* **The main points are that some parts of the union will always be servicing heavy (i.e. home workers) but the organising approach allows for more activity, greater empowerment and a greater longevity of the union**
* **This will lead into later activity about how organised their workplace is.**
 | Questionnaire in workbooks Page 14) |
| (11.40 – 11.55) | Slide 12 | * Suggested first tea break here.
 | Refreshments |
| **Session 3 -****How Prospect Works**(11.55 – 12.20) | Slides 13 – 14/p15  | * Brief overview of Prospect as per the workbook
* Watch the video – How Prospect works (slide 14)
* Learning outcome; Knowledge of union structure. A union is democratic, and its’ structure should reflect that and make that possible. Any member gets to have a say on their workplace no matter how big their employer is.
* As video points out, every branch has a right to raise an issue at their own conference, sector conference or national conference.
* A branch is made up of different offices, roles and sometimes many locations.
* It also has a committee made up of elected positions.
 | Video (update July 2021) |
|  | Slide 15/ p15 | * Outcome to be achieved; how the branch is set up.
* The diagram shows a branch at one location but with 3 different departments.
* According to rules branch must have a chair, secretary.
* Branch meeting where an issue can be raised and discussed, and a democratic decision can be voted on. Much of the vote is the course of action a representative(s) takes up.

with management on behalf of the members.* It is sometimes difficult to attract members to branch meetings, apathy rules in most cases. Decisions still need to be made on the day-to-day business of the branch and to facilitate this, the branch of members elect a committee.
* It’s important that all areas, grades, department and shifts all have representation on the committee.
 |  |
|  | Slide 16/p 15 | * Which branch – does it matter?
* Prospect branches come in all shapes and sizes. They evolve to fit the needs of the members. Most are designed to match the organisation structure of the employer.
* Regional branches – too small to form a branch (under 21 members) or there is no recognition from the employer.
* TU act 2015 for a ballot of members to be legal it has to have all of the members who are affected by the outcome balloted and this can be called into question by the employer.
* Basic principle of this section is that delegates start to understand the structure and democratic structure of union.
* Running a union democratically can be difficult, but it’s worth it.
* Takes balance between pure-representation, and leadership.
* About giving members a say…
* …and making sure they KNOW they have a say, and how.
* Gives them ownership of THEIR union.
* If we can unite members behind an issue raised by them, chosen by them, that’s important to them, it gives us the foundation for VISIBLE union activity.
* One of the main roles of the rep is guiding new members into the right branch.
 | Look at application forms if time. (where is branch needed) |
|  | Slide 17/p16 | * What happens when a member joins?
1. Where they work to be relevant for their workplace
2. Who they work for so pay and conditions can be improved.
3. What their role is, so working conditions can be compared with others
 |  |
|  | Slide 18/ p16 | • Complete action plan if they know their branch chair/secretary etc…. | Refer to the action plan on page 39 in workbooks and ask reps to find out who fill these roles in their branch |
|  | Slide 19/p17 | * Outcome to be achieved: what can happen at a meeting or a committee meeting.

A meeting needs to be in quorum for a decision to be made and action taken at the meeting. A quorum is enough members to be a reasonable representation of the branch total number; it can be set to reflect the branch, so 10% for instance. Emphasise that the committee acts upon the will of the members at the meeting. It is generally the case that the committee must steer the members into making a decision and keep expectations realistic. |  |
|  | Slide 20/p17 | * How do branches target their resource/efforts at the right issues
* Steer discussion towards reflecting the issues of interest to the majority of membership.
* Then challenge with consideration for importance/urgency, e.g.
	+ Issue 1 = quality of the teabags in meetings/could be Co-vid related instead
	+ Issue 2 = widening gender pay gap in department B
	+ Issue 3 = compulsory redundancies in department C
 |  |
|  | Slide 21/p18 | * Diagrams of support and the structure of Prospect (include MCC)
* So, delegate understands what support is available
* Orange = any member can access
* Green = Generally reps’ access on behalf of members
* Yellow = reps/members access with notification to Officer/Organiser
* Pink = accessed via Officer/Organiser
* Tutor to mention that not all branches will have access to an organiser
 | Action plan (p39) – find out who is your Negotiation Officer and Organiser for your branch |
|  | Slide 22/p19 | * Structure in more details and shows the link between the member and the union (the influence is at the hands of the members)
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| **Session 4 –****The role of a rep**(12.20 - 13.00) | Slide 23/p20-23Slide 24/ p20Slide 25/p20-23Slide 26/p23Slide 27-29/p25 Appendix 3Slide 30-31/p24Slide 32 | * Basic of reps’ role in more detail as they are key link between members and union
* Prospect prides itself on its reps and the good work they do.

(Many reasons members become reps)1. They are good communicators and other members think they would be best for the job
2. Feel strongly about issues and want to change things for the better
3. Dissatisfied with something at work and wants the rights of a rep to influence members and management.
4. Persuaded by another rep.
5. Give something back as a member who’s been helped by Prospect.
6. No one will step forward and a rep is needed.
* **Activity E What do union reps do? (20 mins for activity)**
* **In a big group make a list of all the things a rep may do as part of their duties**
* **Reinforce that to look what they would want a rep to be in ideal world.**
* **Make a list of the skills needed – no one will have all skills so split role if possible so focus on individual strengths. Refer to jigsaw to what a strong branch looks like**
* **Pick the 4 most important.**
* **Union reps; negotiate agreements with employers on pay and conditions, discuss major changes , such redundancy, discuss members concerns with employers, accompany members to disciplinary and grievance meetings and hearing, help member with legal and financial problems (with support of Prospect)**
* **Skills; Empathy, Good listener, Persuasive, Good communicator, tenacious.**
* **Highlight no every rep can be good at everything, play to your strengths and don’t burn out.**
* **Recap over the different types of reps and ensure delegates know there are pathways open to their future learning (jigsaw of different rep roles – page 26)**
* Go through slide values and behaviours expected.
* Overview of GDPR – do’s don’t and pitfalls. Suggest reps also look at their workplace policy regarding their role as a rep and what they can use and are entitled to.
* Overview of eSite system – ensure delegates know of the pitfalls as new reps and for the most GDPR compliant way of emailing and contacting members, use the eBranch.

\*New template agreement added to the course resource area for reps to formalise their own agreement with the employer around Data needs. * Before break for lunch remind of action plan and recap.
* Recap on expenses/travel policy etc
 | Flipchart activity?Mention further training.One crucial point all reps need to be aware of GDPR more information in the appendix.More Expense forms if needed |
|  | Slide 33 | * Suggested Lunch Break 13.00 – 13.45
 |  |
| **Session 5****The rights of a rep**(13.45 – 14.10)(14.10 – 14.25) | Slide 34/ p26Slide 34/p26Slide 35 – 38l/p26-27Slide 39/p28 - 29Slide 40/p30 | * Confidence of the rep – what they can/can’t do and what to ask for from their employer.
* Session looks at the rights and how you can challenge your employer on what you need to do your role.
* Legal rights Overview (ACAS code of practice 3)
* Describe the difference between Duties, Activities, Responsibilities
* Facilities agreements
* **Activity F – what are your rights?**
* **Working in different small groups, put the right example below in workbook and match it with the right heading (10 mins for activity) Pick a spokesperson to feedback to group**
* **Tutors note (suggested answers responses in bold).**

**Duties, should include; staying vigilant and taking action on H&S issues(H&S), representing members in disciplinary/grievance, attending meeting s to discuss internal union business (could be activity too), organising education opportunities (ULR), keeping members informed of all union activity.** **Activities would include recruiting members, setting up events and attending stalls in the workplace.****Responsibilities could include; keeping employer informed about any time off for union duties****Not responsible for; balloting for strike action, acting as a primary support for a member with mental health issues; representing themselves, help member submit a claim to an employment tribunal, sorting out personal difference between colleagues (may crossover into activity dependant), advising those who are not members of the union (may crossover if during a recruitment)*** **Are there any crossovers?**
* **Where can you find evidence to back up your initial thoughts?**
* **Activity G. What would you do if?**
* **In the same groups look over the following situation below and decided which action should be taken (can give each group a problem each if time is short)**
* **Answers that we are looking for;**
* **A member has approached you as the rep. In a recent meeting with male colleagues, this female member was asked to take the minutes. As the only female in the meeting, she now feels uncomfortable as it isn’t part of her role, what can she do? Raised as being against the Equality act or conscious bias.**
* **A member has approached you because she witnessed another member being racially abused by another member of staff. When she complained to her manager, she was told nothing could be done as she wasn’t the one being abused this is still against the equality act.**
* **A member comes to you as they feel like their privacy is being invaded due to new CCTV being added in their area at work. This is starting to affect their mental health. Management must disclose what is the purpose and use of the CCTV. What is affecting the member, maybe anxiety of being told off all the time.**
* **The union has a bad reputation with a group of part-time workers who feel they are under-represented. None of the group are in the union. Responses such as I am different to the previous rep and encourage one of that group to train as a rep.**
* **A member approaches you as they feel they may be discriminated against. Their boss lives and breathes work and expects the member to do so as well. As a single (marital status) employee, the member has noticed the expectation is not as great for those with families. Is there anything they can do? What does their contract say, is there a policy on work life balance**
 | Tutor to encourage reps to check their recognition agreement and possibly updating it with their Branch OfficerTutors remind reps that they should only represent members in formal meetings after completing reps part 2 |
| **Session 6** **Ingredients of Union influence**(14.25 – 14.45) | Slide 41/p31 | * We’ve now looked at the rights of the rep and offered some scenarios into some workplace issues.
* Building on from the Servicing Versus organising exercise, it is important that all members know they can be active including recruiting, assisting with events, compiling newsletters, putting items of notice boards so it doesn’t always fall to you are the designated rep. It may be that you’ll recruit another rep just from involving them in these types of activities.
* The more activity you have in branch, the more people will hopefully want to get involved.

This short session is designed to steer discussion back to collective methods where we, as trade unionists, can really add value. |  |
|  | Slide 42 -43/p31Slide 43/p31 | * **Activity H – what are the ingredients that increase the union’s influence?**
* **Split participants into small groups; assign each group an ‘ingredient’ of union influence.**
* **Explain that they will have to make the case why \*their\* ingredient is THE key to union influence. Allow 5 minutes for them to discuss/build their case.**
* **In plenary discussion, give each group max 2 minutes (time it to ramp up the energy!) to make their case/demolish the competition.**
* **Membership density, It is very important that reps realise, without enough members the management will not take the union seriously and could look to de-recognise the union.**
* **Engaged members, it is very unlikely that any issues will get resolved if the member are not involved or care.**
* **Visible Profile, the management will conveniently forget to consult if they never see a union presence. Why would a non-member join something they never see or hear about**
* **Dialogue, the need to have good lines of communication to members and management is necessary to make things happen**
* **Representative membership, if members don’t feel they have a voice, their membership will be their first cost saving when they look at it**
* **Representatives - with input, forgotten workforce, seeing no value to TU, nothing will get done, low membership, no activity.**
* **Equality & diversity – highlight that members expect these issues to be addressed, everyone wants to work in an equal workplace and reps fighting for equality and diversity issues can be high profile and promotes the values of trade unionism.**
* **In case it hasn’t been covered, ask how these ingredients sustain each other. What’s the role of the rep in all this?**
 | 7 ingredients as on powerpoint/workbook |
| 14.45 – 15.00 | Slide 45/p32-33 | * **Activity I - Why don’t people join a union?**
* **Recruitment activity**
* **Overview; we have focused on the why a union is important and why it’s relevant to people, looked at the rights and the role of the reps as well as how important it is to ensure the 6 ingredients are present as well as to engage in why these are important. One of the main roles of the rep is to recruit (often as you can give the most valid reasons from this training as to why they should join!) It isn’t just your job though and important to remember that.**
* **In different small groups, the tutor will provide you with a common answer for not joining a union or Prospect specifically and In your groups, please come up with a point for each answer as to how you’d try to persuade the non-member.**
* **Point to raise, is it just the reps role to recruit? Use of the word “we” rather than Prospect when saying what is possible. Refer to the top ten reasons**
* **Raise the concept of joining the gym is similar to joining a union. Just because you pay your subs you don’t get any fitter unless you participate and you don’t get change in the work without participation with your union.**
 | 10 good reasons as to why people have joined Prospect to use as a resource in the future. |
| 15.00 – 15.15 | Slide 46 | * Suggested tea break
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| **Session 7****Building a stronger Union**(15.15 – 15.35)15 mins | Slide 47/p34Slide 48/p34Slide 49 | Building a stronger union* **Activity J – Staff room talk**
* **Watch the video and discuss how the recruitment went. (5 mins)**
* **In smaller groups, (10 mins) discuss one of the 3 points below could be taken forward and feedback to the wider group;**
* **Staff Surveys, IT issues, unachievable targets.**
 | Split into 3 groups |
| (15.35 – 15.55)5 mins10 mins | Slide 50/p35 | * **Activity K How well organised is your workplace?**
* **Following on from the previous activities – this is an opportunity for reps to access**

**where they feel their branch is at present in terms of how well organised, does the delegate feel the branch has adopted the right approach to recruiting and organising and union activity*** **Where would the reps like to see if going in the future**
* **Following on from activities which have asked you to complete element of the action plan, please look at the 4th point in the action plan and use ideas from the following activity to help complete it**
* **Reflecting back to the questionnaire on servicing and organising on activity 4 and the previous activities, please add your responses into point 4 in your action plan**
* **On a scale of 1 – 10 how organised do you feel your workplace is?**
* **How is your workplace organised?**
* **How do you feel your workplace could be improved in the following areas, rate each area 1- 10 now and how they could improve the score?**
1. **Building Membership**
2. **Communication with members**
3. **Getting members active**
 | Additional resources: Servicing V Organising questionnaire (page 14)Action plan (page 39) |
| **15.55 – 16.25****(30 mins for whole activity)** | Slide 51/p36-37 | **Activity L Charting in the workplace.** **• As the tutor we would suggest dividing the group to have reps to look over each department and pick out the key findings. There are two different proposals, so the groups may want to divide themselves into the organising of the branch/members and then devising the strategy.****• NOTE; The second proposal is the same amount of hours for staff but over a 10 day rolling rota rather than a 5 day rolling rota.****• We want reps to identify the following.****• find out where members are and the strength in the workplace, areas which could be improved in terms of membership.** **• What can they do to engage members further?****• Highlight the two different proposed changes and would this change their approach to management. We would suggest using a working party as two proposals affect different groups – who would be on the working party (ideally one from each department – won’t always necessarily need to be the rep)****• How would their members feel about the first proposal?****• How many members are affected negatively by the second proposal for operations – two reps in the department but differing views – would this provide a balanced view. (What do we think of Martha’s viewpoint as the rep? Perhaps working on her own agenda of trying to increase pay rather than thinking of the work/life balance)****• What if there is a well-being policy within the workplace?****• Can anyone be identified as a potential rep/advocate for the union?****• Things to remember when recruiting/then mapping the workplace…** **Pitfalls to doing this; membership list is only updated on the information members have given to us e.g. if a member has left they won’t necessarily let Prospect/Bectu know and so they may still show on the membership list.** **• The list is private and confidential/any notes you make about members/non- members need to be kept very securely. Not every member wants to be known and you’ll have to show some discretion in your work as a rep (hence the ebranch and the list of members most GDPR compliant way of contact members.** **• Always be wary of GDPR, if members have expressed a wish no to be contacted, we must honour that as part of the consent on the application forms.** **(use points on p38 to help)** |  |
| **Session 8****Putting what you’ve learnt into practice.****Action Plan****16.25 – 16.27** | Slide 52/ p39 | * **Ensure everyone has a clear focus on their action plan when going back into the workplace.**
* **Suggest how the mapping can be transferred to the workplace**
* **What will they stop, continue or start to do**
 | Action plan |
| **Summary of day****(16.27 – 16.30** | Slide 53 | * Go over learning outcomes from delegates at beginning of the day
* Any questions?
* Clarify links and further information & appendix if needed (page 40-50)
* Ensure delegates complete an expense form and clarify the expenses claims again!
* Evaluation form and hand them in before they leave.
* Expenses forms can be sent to education@prospect.org.uk in case delegates need to scan through additional receipts.
* For tutors on the NEP, please ensure an Equality and Diversity form is completed for all attendees, this is to ensure we can continue to fund course for the wider union.
 | Notes on expenses;Delegates need to have food with their wine and not the other way around!All expenses **must** have receipts attached; we can’t just pay out on the amounts. (as per staff expenses.)No taxis will be reimbursed unless valid reason is stated on form. |
|  |  | * + End of the day!
 |  |